Cada pergunta/ escolha tem um impacto diferente sobre a pontuação do R^2

Problemas reconhecidos | Solução correta | Ações corretas | Tipo de contato, linguagem e roteamento | compatível

Nível 1 Qs	Nível 2 Qs	Nível 3 Qs	Impacto R^2
A resposta reconhece todas as preocupações dos clientes**?**	**N/A**		**Auto-falha -100**

Right Answer -- Right solution

Problemas reconhecidos	**Solução correta**	Ações corretas	Tipo de contato, linguagem e roteamento	compatível

Nível 1 Qs	**Nível 2 Qs**	**Nível 3 Qs**	**Impacto R^2**
A solução ou informação é comunicada de maneira precisa e consistente conforme a lógica de suporte?	...**Não segue a lógica documentada** para a Issue correta.	A lógica existe, porém a comunicação não está conforme. A lógica existe mas não é clara. A lógica existe, mas parece desatualizada. Sem lógica documentada para este cenário.	**Auto-falha -100**
	...segtue a lógica, porém **contêm informações imprecisas**	**N/A**	**-50**
	...segue a lógica, porém requer informações disponíveis no Tools ou no contato do cliente.		**-50**

Right Answer -- Right actions

Problemas reconhecidos	Solução correta	Ações corretas	Tipo de contato, linguagem e roteamento	compatível

Nível 1 Qs	Nível 2 Qs	Nível 3 Qs	Impacto R^2
Todas as ações são executadas corretamente por lógica documentada (viagem, conta, interno, externo)?	**Ação(ões) em Trips ou financeira** não segue a política documentada para a pergunta ou problema do cliente.	Erro monetário	**Auto-falha -100**
		Erro não monetário	
	Ação(ões) na conta não seguem a política documentada para a pergunta ou problema do cliente	**N/A**	**-15**
	Ação(ões) Interna(s) não executada (s) por lógica documentada (não orientada para o cliente)		
	Ação(ões) Externa(s) ou processo não executado por lógica documentada.		**-100**

Right Answer -- Contact type, language & routing

Problemas reconhecidos | Solução correta | Ações corretas | **Tipo de contato, linguagem e roteamento compatível**

Nível 1 Qs	Nível 2 Qs	Nível 3 Qs	Impacto R^2
Is the contact type selected **the most recent, relevant** (as prescribed by documented logic), and **reflective of priority issues**?	Contact type is recent and relevant, though a **more granular contact type is available**	**N/A**	**-7.5**
	Contact type is **not aligned to most recent concern**		**-15**
	Contact type is **not as prescribed by documented logic**		
	Contact type is **not a priority contact type** (if applicable to region)		
	Level not selected per documented logic		
	Country and/or language not updated		

Right Answer -- Compliant

Problemas reconhecidos	Solução correta	Ações corretas	Tipo de contato, linguagem e roteamento	compatível

Nível 1 Qs	Nível 2 Qs	Nível 3 Qs	Impacto R^2
Is the communication **aligned with all legal, regulatory, and privacy guidelines**?	Communication includes unapproved legal/ regulatory language Communication or action/s compromised a user's privacy Communication or action/s breached Uber's confidentiality	**N/A**	**Auto-falha -100**

Each question/ choice has different impact on R^2 score

Response opening | **Response body** | **Response ending** | **Concise** | **Other modality specific questions**

Nível 1 Qs	**Nível 2 Qs**	**Nível 3 Qs**	**Impacto R^2**
Does the **response opening/ body/** ending **meet approved standards**?	Does not align with **contextual language standards** Does not align with **regional opening/ body/ ending standards**	**N/A**	**-15**

Right Way -- Concise

Response opening	Response body	Response ending	Concise	Other modality specific questions

Nível 1 Qs	Nível 2 Qs	Nível 3 Qs	Impacto R^2
Is the response or communication **free of duplicative statements**?	Response contained the **same saved reply used in a prior response** in the same contact Response **repeated content across multiple sentences**	**N/A**	**-10**

Right Way -- Other modality specific questions

Response opening	Response body	Response ending	Concise	Other modality specific questions

Nível 1 Qs		Nível 2 Qs		Impacto R^2
Spelling & Grammar *(For text/ email/ chat)*	Is the response free of linguistic and structural errors (spelling, grammar, or punctuation) ?	1-2 spelling and/or capitalization errors (Names)		**-5**
		3+ spelling and/or capitalization errors (Names)		**-10**
		1-2 spelling and/or capitalization errors (Non-names)		**-5**
		3+ spelling and/or capitalization errors (Non-names)		**-10**
		1-2 grammar, punctuation, and/or phrasing errors		**-5**
		3+ grammar, punctuation, and/or phrasing errors		**-10**
		1-2 formatting and/or paragraphing errors		**-5**
		3+ formatting and/or paragraphing errors		**-10**

Right Way -- Other modality specific questions

Response opening	Response body	Response ending	Concise	Other modality specific questions

Nível 1 Qs		Nível 2 Qs		Impacto R^2
Clarity of speech *(For voice)*	Is the agent's speech audible, articulate & without phrasing error?	Agent's speech is unclear due to phrasing errors, or poor articulation		**-10**
		Agent did not speak loud enough, or speech is unclear due to volume or clarity of agent's phone line		
Clarity of speech *(For voice)*	Did the agent follow approved hold procedures?	Procedures before putting the customer on hold were not followed		
		Procedures during the hold were not followed		
		Procedures after the hold were not followed		

Right Way -- Other modality specific questions

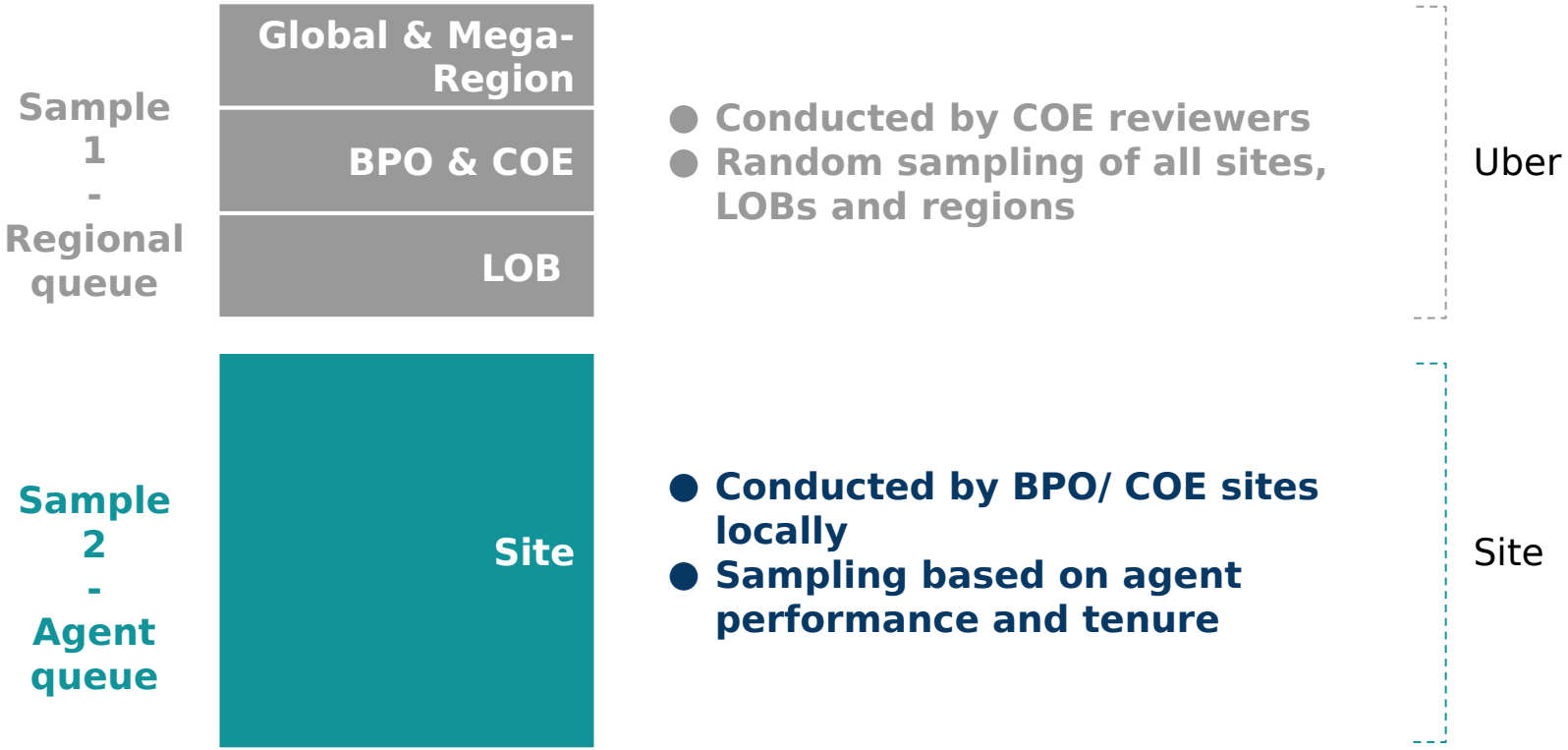
Response opening	Response body	Response ending	Concise	Other modality specific questions

Nível 1 Qs		Nível 2 Qs		Impacto R^2
Call control (For voice)	Did the agent communicate effectively in all situations and correctly manage sub-optimal situations (if applicable)?	Agent did not correctly apply techniques to manage sub-optimal situations		-10
		Response structure contains at least one communication lapse		
Chat hold (For chat)	Did the agent follow approved chat hold procedures?	...did not follow procedures before putting the customer on hold		
		...did not follow procedures during the hold		
		...did not follow procedures after the hold		

R² sample and queues

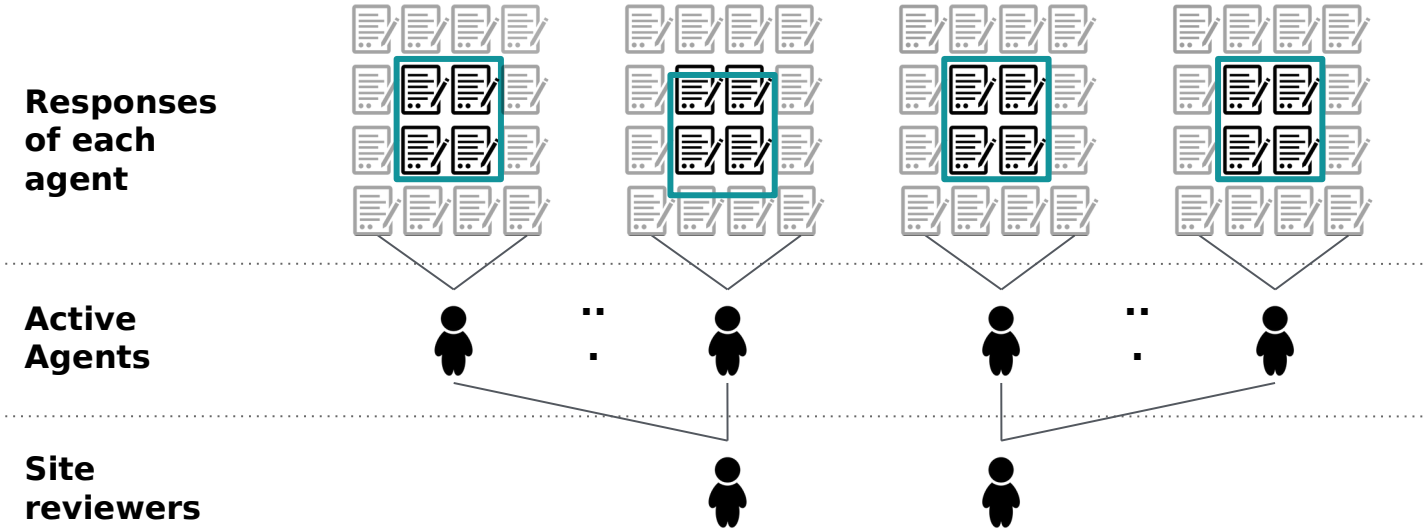
Two review samples: One for Uber, one for each site

Uber to audit to LOB level; Sites to audit to agent level



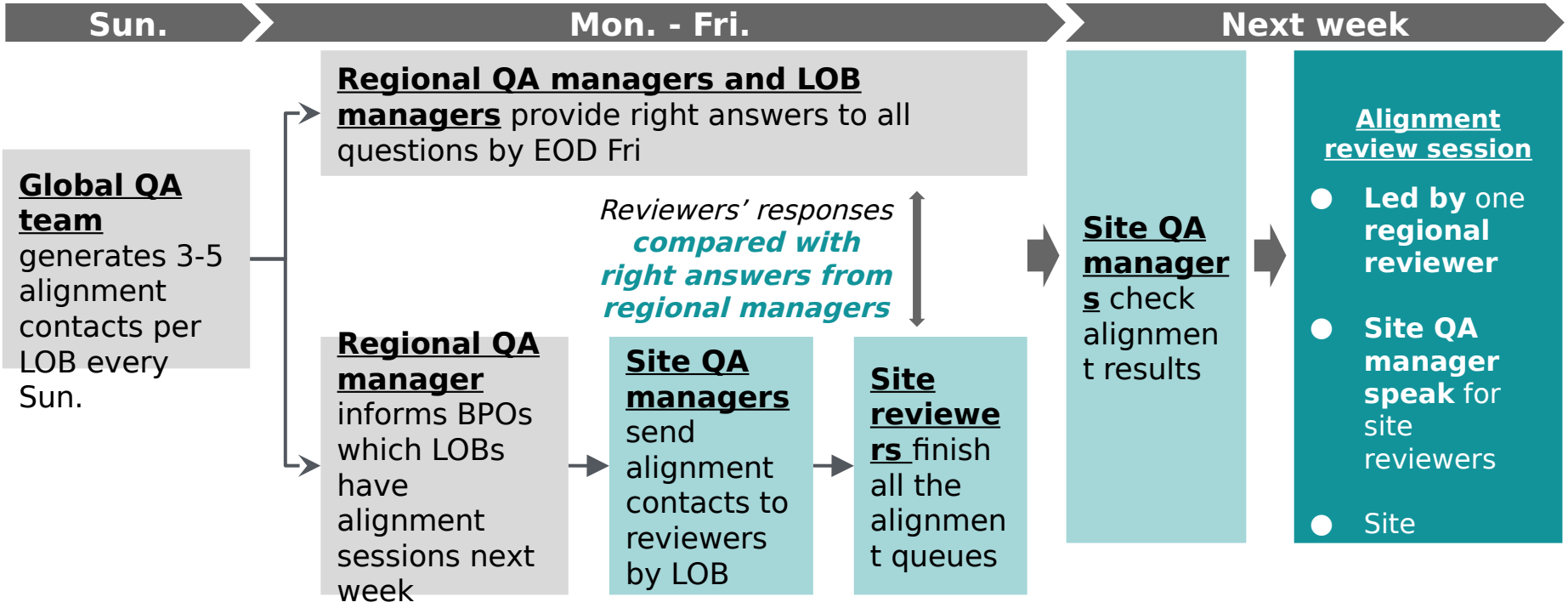
BPO agent queues: 4 responses per agent per week

→ **4 responses per agent per week randomly selected for R² review by site reviewers**



→ **After launching R2, you could find weekly queue here**

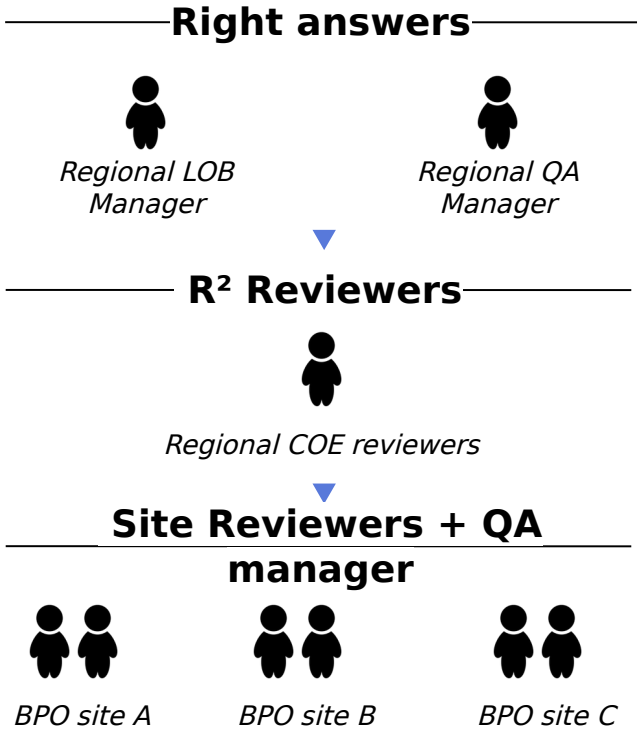
Standard BPO reviewer alignment process


Sun.
Mon. - Fri.
Next week
Global QA team generates 3-5 alignment contacts per LOB every Sun.
Regional QA managers and LOB managers provide right answers to all questions by EOD Fri
Reviewers' responses compared with right answers from regional managers
Regional QA manager informs BPOs which LOBs have alignment sessions next week
Site QA managers send alignment contacts to reviewers by LOB
Site reviewers finish all the alignment queues
Site QA managers check alignment results
Alignment review session
Led by one regional reviewer
Site QA manager speak for site reviewers
Site

Note:

1. *Alignment contacts generated by **customized R² LOBs**, we recommend all **site reviewers map into one LOB** (see full list here).*
2. *To save time, **site** could only **conduct alignment when there is weekly alignment review session scheduled** (although alignment tickets generated every week automatically)*

BPO Site alignment sessions led by a regional R² reviewer



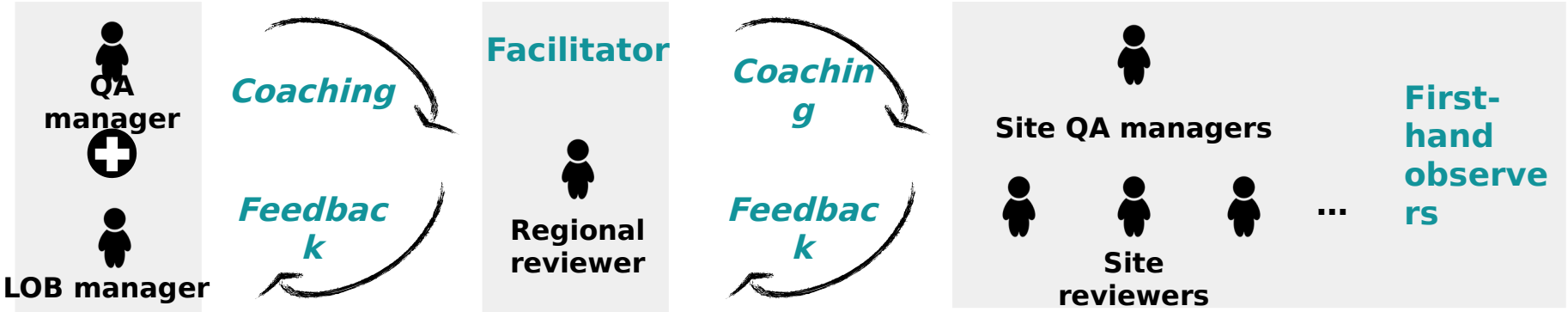
Regional managers lead regional alignment sessions with regional R² reviewers
Managers correct any misalignments within R² reviewers and field questions from R² reviewers

A regional R² reviewer, in turn, leads an alignment session with site reviewers by LOB

For session of each LOB, all site reviewers and QA managers supporting this LOB should attend: *If multiple sites serve one LOB, still attend the same session*
QA managers can represent reviewers for discussion: *This helps to keep large group sessions organized*

Review session is critical to improve alignment

An evolving coaching and feedback loop



For reviewers: Correct misconceptions	**For QA managers: Address gaps**
Correct common mistakes and reinforce correct answers, conduct further training sessions if needed	Get feedback from reviewers on how to improve logic/ tools, what to be strengthened for training

Other notes about BPO alignment session

- **3-5 contacts per week per LOB**, which is a **subset of regional alignment tickets**
  - BPOs only need to conduct tier 1 tickets in the regional alignment queues

- **After launching reviewer alignment, site QA managers could find weekly queue here**, then you need to send it to all reviewers by LOB
  - BPOs only need to conduct LOBs with alignment sessions scheduled next week

- **BPO reviewer alignment dashboard** will be developed by global team, and **site QA managers need to check results and insights before every alignment session**

Key terms and metrics definition

Terminology	**Contact/ Ticket**	• Refers to a specific **response/ interaction under review**, between agent and rider/ driver ■ In R2, we only review one response for each ticket (usually the latest one)
	Question	• Refers to the R² review question, ~10-12 questions per contact, depending on modality • In alignment process, LOB manager covers 3 questions about "**Right Answer**", regional QA manager covers the rest questions on "**Right Way**"
	Compliance	• For one question: **reviewer audits twice** + **right answer provided by regional QA manager/ LOB manager**, depending on question type • For one contact: **reviewer audits all questions twice** + **all right answers provided by both regional QA manager and LOB manager**
	Alignment	• For each question, only if reviewer's answer is **consistent** (responds the same between two times) and **accurate** (responds the same as regional QA/ LOB manager)
Metrics	**Non-compliance rate**	• Calculated based on question level • % of questions not been audited twice by reviewers, or not provided right answers by regional QA manager or LOB manager
	Alignment score	• Calculated based on question level • % of questions that are both **consistent** and **accurate**

Access R^2 data -
TL weekly review dashboard

A partir daqui pra semana que vem! 23/10

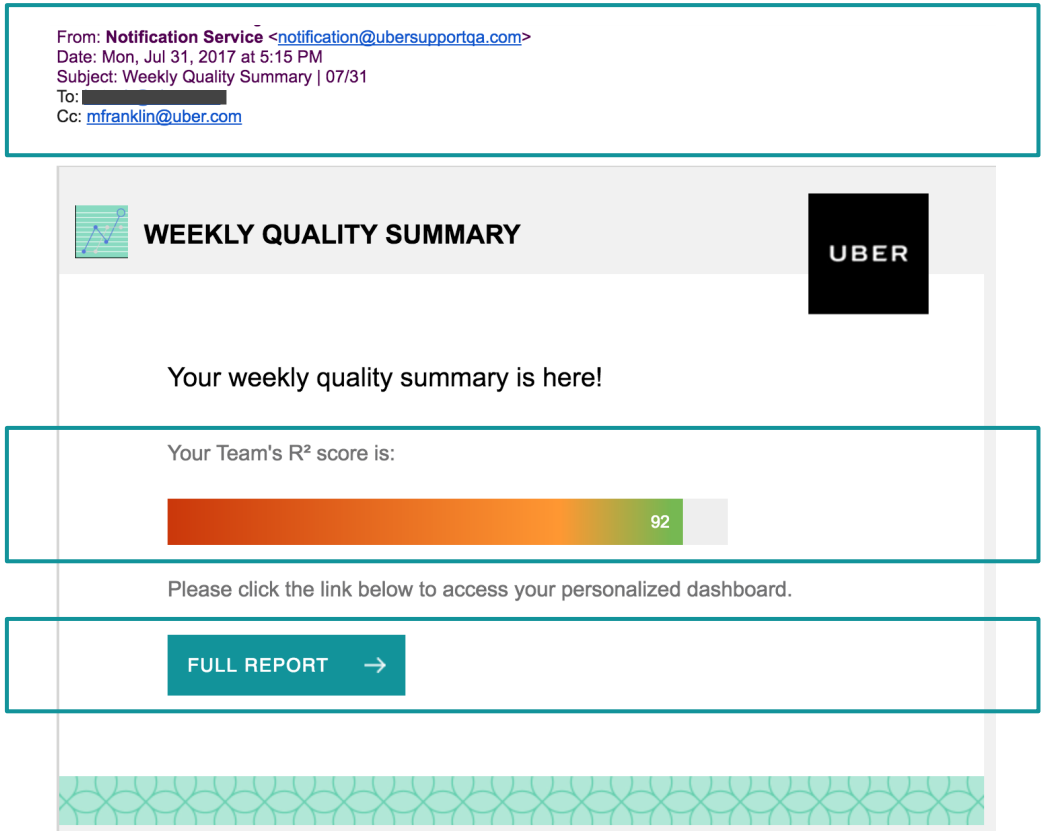
Team Leads will receive weekly result report

Only receive review results from site reviewers

Automatic weekly email sent to each Team Lead

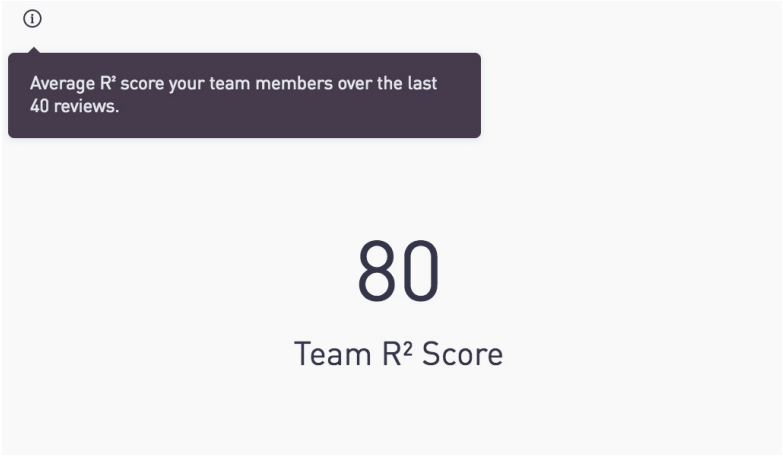
Team R^2 score (avg. of all agents in your team)

Link to full report



Overview of team performance

Team R^2 score:
Average of agents' score,
which based on last 40 reviews
(from BPO agent queue)



Error Rate by Question

QUESTION	ERROR RATE
acknowledge_issues	2.27%
right_actions	6.82%
right_solution	13.64%
spelling_chat	0.00%
compliant	0.00%
contact_type_routing	6.82%
response_opening	2.27%
response_ending	2.27%
contextual_language	6.82%
concise	0.00%
spelling_text	2.27%
clarity_speech	0.00%
phone_hold	0.00%
call_control	0.00%
chat_hold	0.00%

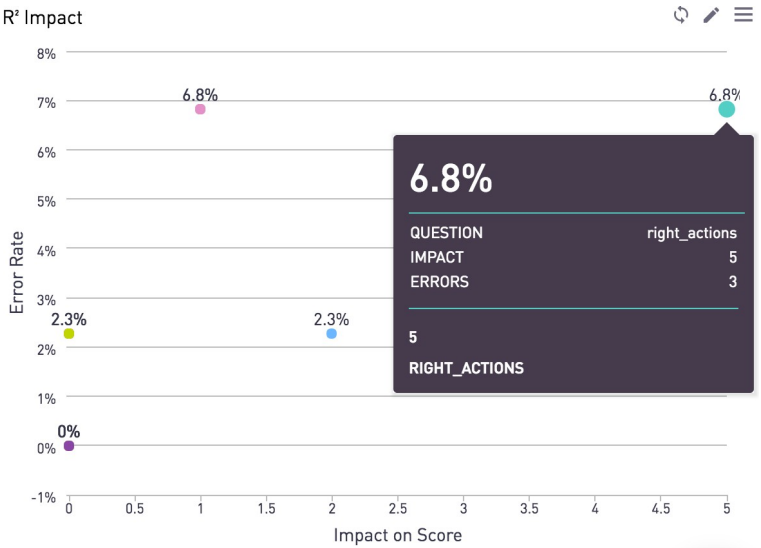
Error rate by question:

Among all responses under review in your team, % of responses that got markdowns for each question

More focus on questions with high error rate and high R^2 impact

Error rate by question:

% of responses that got markdowns for each question



Impact on score by question:

Where and how much you lost your R^2 scores, e.g. your R^2 score is 80, then 5 points lost because of right_action markdowns

INSIGHTS

- TLs should focus **coaching and training** on **quick-wins**: questions with **high error rate** and **high impact**
  - E.g., addressing issues on right actions can raise R2 score from 80 to 85
- Some questions with high error rate, but low impact because its low weight in R^2 scoring system

Agent level result show individual performance on R^2

Agent Specific Performance Below

Aresen@ext.uber.com

R^2 Score by Agent

AGENT EMAIL	REVIEWS	R2 SCORE
[redacted]t.uber.com	1/40	100
[redacted]t.uber.com	2/40	100
[redacted]xt.uber.com	2/40	100
[redacted]t.uber.com	2/40	93
[redacted]t.uber.com	2/40	93
[redacted]uber.com	1/40	85
[redacted]t.uber.com	10/40	78
[redacted]t.uber.com	8/40	71
[redacted]uber.com	4/40	50
[redacted]xt.uber.com	2/40	50
[redacted]xt.uber.com	2/40	50

ⓘ R^2 - Right Answer

AGENT EMAIL	ACKNOWLEDGE ISSUES	RIGHT SOLUTION	RIGHT ACTIONS	CONTACT TYPE	COMPLIANT
[redacted]xt.uber.com	100	67	67	100	100
[redacted]t.uber.com	100	100	100	100	100
[redacted]xt.uber.com	100	100	100	100	100
[redacted]xt.uber.com	100	100	100	100	100
[redacted]t.uber.com	100	100	100	100	100
[redacted]t.uber.com	91	82	91	82	100
[redacted]xt.uber.com	100	100	100	100	100
[redacted]xt.uber.com	100	100	100	100	100
[redacted]xt.uber.com	100	100	100	100	100
[redacted]uber.com	100	100	100	100	100
[redacted]t.uber.com	100	100	75	100	100

- **R^2 score of each agent** in your team
- # of reviews captured in the R^2 score for each agent

- **Correctness of each agent on each question**

  % of qualified responses*100 (Within past 40 reviews)

INSIGHT

- Know **each agent's performance on R^2** in your team
- For underperforming agents, **which question** they have **lowest correctness**, and should **improve the most**

Identify agents with the most mistakes and highest impact

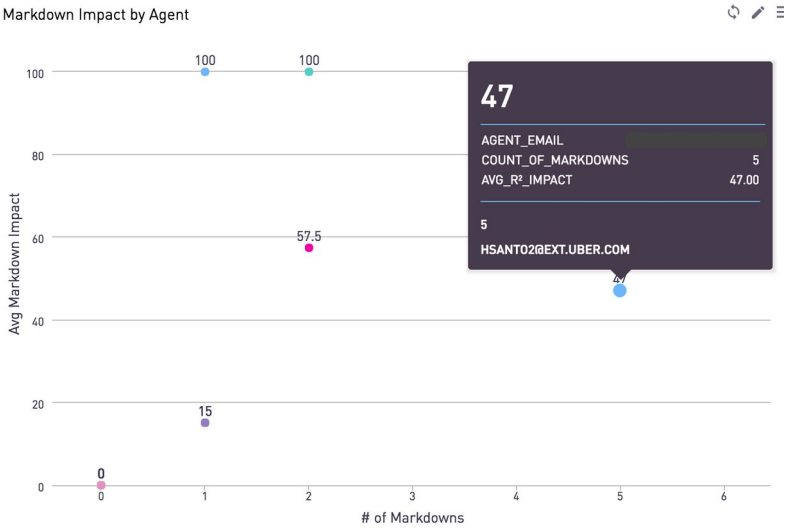
Avg. R^2 impact of each markdown:

Avg. R^2 score deducted per markdown for

Example

A got R^2 score of 80, and 5 markdowns, avg. markdown impact is 4

B got R^2 score of 80, only 1 markdown, avg. markdown impact is 20



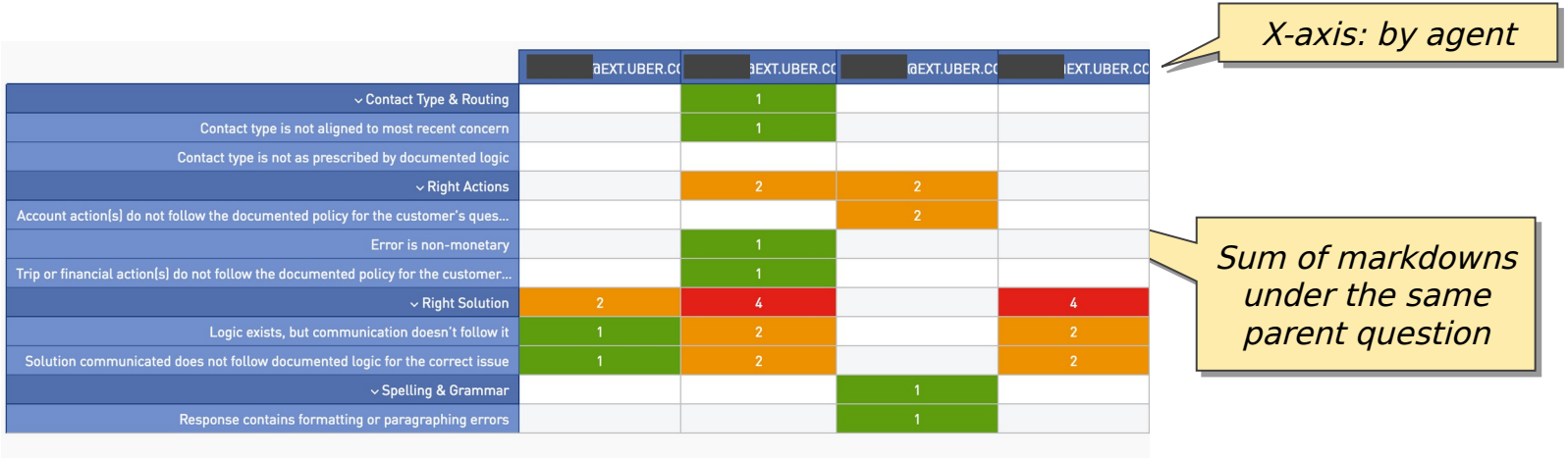
# of markdowns by agent:

Among all the R^2 question of past 40 reviews, # of questions marked down for each agent

INSIGHT

- **Who make the most mistakes**
  - Agents on the right of the chart
- **Whose mistakes impact R^2 most**
  - Agent on the top
- So as to **customize coaching directions for each team member**

Deep dive into level 2/3 markdowns for detailed reasons



	[redacted]@EXT.UBER.CO	[redacted]@EXT.UBER.CO	[redacted]@EXT.UBER.CO	[redacted]@EXT.UBER.CO
Contact Type & Routing		1		
Contact type is not aligned to most recent concern		1		
Contact type is not as prescribed by documented logic				
Right Actions		2	2	
Account action(s) do not follow the documented policy for the customer's ques...			2	
Error is non-monetary		1		
Trip or financial action(s) do not follow the documented policy for the customer...		1		
Right Solution	2	4		4
Logic exists, but communication doesn't follow it	1	2		2
Solution communicated does not follow documented logic for the correct issue	1	2		2
Spelling & Grammar			1	
Response contains formatting or paragraphing errors			1	

# of markdowns by agent by question:

Split into the level 2 questions, more details about every agent's markdown

Understanding performance and coaching agents

Close the loop (CTL) dashboard

Step by step process when coaching your agents

Step 1	Open Periscope and log in
Step 2	Go to [R²] Close the Loop and apply filters
Step 3	Complete all pending CTL links

UBER

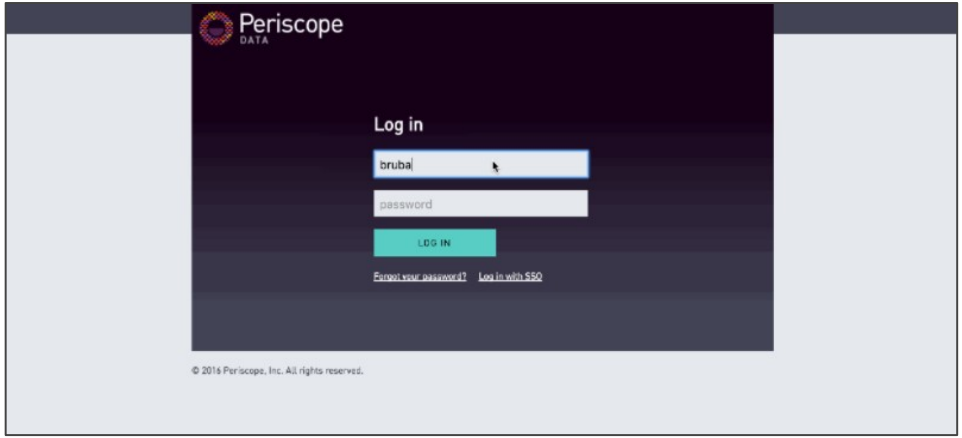
Step 1 | Step 2 | Step 3

Close the loop (CTL) dashboard

Open Periscope and log in

Request Periscope access through this form. Provide all required information

- **Team**
- **Facility** (e.g. COE_UBR_MNL)
- **Region**
- **First name**
- **Last name**
- **UBER email address**



Website: www.periscopedata.com

*It takes up to 2 business days to have the account created. Any account that is not active for a period of 30 days will be removed.

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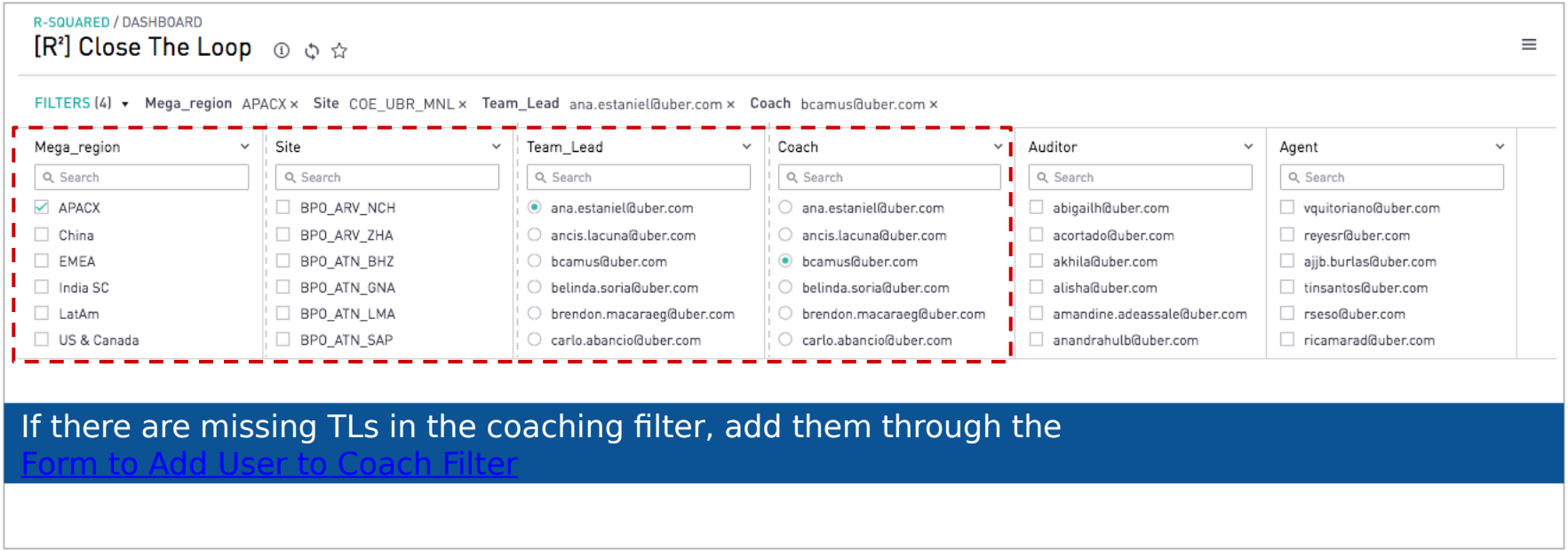
Close the loop (CTL) dashboard

Go to [R²] Close the Loop and apply filters

Access the '[R²] Close The Loop' dashboard and select all required fields



If there are missing TLs in the coaching filter, add them through the Form to Add User to Coach Filter

UBER

Step 1 | Step 2 | Step 3

Close the loop (CTL) dashboard

Complete all pending CTL links

Coach the agent within 48 hours of the CTL results becoming available. Results are only available for 7 days.

FILTERS (4) ▾ Mega_region APACX Site COE_UBR_MNL Team_Lead carlo.abancio@uber.com Coach carlo.abancio@uber.com

ⓘ Outstanding Close the Loop: Apacx - Coe Ubr Mnl - Carlo.abancio@uber.com

DATE SOLVED	DATE AUDITED	DROP DATE	AUDIT TYPE CODE	AGENT	TEAM LEAD	AUDITOR	CONTACT ID	CTL LINK
06-18	06-26	07-03	GLO	fnayan@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	dfd7bff5-1822-47f8-b112-d442ed8ae1b7	CTL Link
06-18	06-27	07-04	COE	grey@uber.com	carlo.abancio@uber.com	melanie.alaman@uber.com	54ae2b51-e3a4-4e43-91ff-4bb364ae2b5f	CTL Link
06-18	06-27	07-04	COE	grey@uber.com	carlo.abancio@uber.com	melanie.alaman@uber.com	356b5684-c33d-4f9c-9559-4279de5f7343	CTL Link
06-18	06-29	07-06	COE	pingnava@uber.com	carlo.abancio@uber.com	melanie.alaman@uber.com	3d81872c-d853-4ac4-b13e-b41b4d916b6b	CTL Link
06-18	06-29	07-06	COE	rsalazar@uber.com	carlo.abancio@uber.com	melanie.alaman@uber.com	0697ca5d-ad61-4e1e-b389-a21af5b73326	CTL Link
06-18	06-30	07-07	GLO	rverdera@uber.com	carlo.abancio@uber.com	k2lsanchez@uber.com	79bc6d44-ac5d-4801-8405-fca097583d7c	CTL Link
06-19	06-28	07-05	GLO	grey@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	323b5e12-17d6-4329-972a-abcb83cb69b3	CTL Link
06-20	06-26	07-03	GLO	angelle.bagano@uber.com	carlo.abancio@uber.com	rechel.butt@uber.com	b7421d51-55ae-4aab-8281-a7004ed8e89b	CTL Link
06-20	06-26	07-03	GLO	grey@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	ab2af838-4e4b-4496-9541-f312882f5941	CTL Link
06-20	06-27	07-04	GLO	grey@uber.com	carlo.abancio@uber.com	emendoza@uber.com	43d0d5d7-c368-4286-9a3f-adfbf76ab2cd	CTL Link
06-20	06-28	07-05	GLO	grey@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	038e977c-178a-4087-9470-4f7863ac4307	CTL Link
06-20	06-28	07-05	GLO	mfernandez@uber.com	carlo.abancio@uber.com	lilybeth.delatorre@uber.com	d979f0b0-f01c-4830-b5c8-8986c82a2af8	CTL Link
06-20	06-28	07-05	GLO	jnpenaflor@uber.com	carlo.abancio@uber.com	emendoza@uber.com	c92e7475-00f0-4703-8847-76edd459d4dd	CTL Link
06-21	06-26	07-03	GLO	jnpenaflor@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	40d307c2-b229-449a-8bf0-c4f1a9154efb	CTL Link
06-21	06-26	07-03	GLO	jnpenaflor@uber.com	carlo.abancio@uber.com	jlimcaoco@uber.com	acac2c49-2e25-45ff-b11a-ae76b64bcd17	CTL Link

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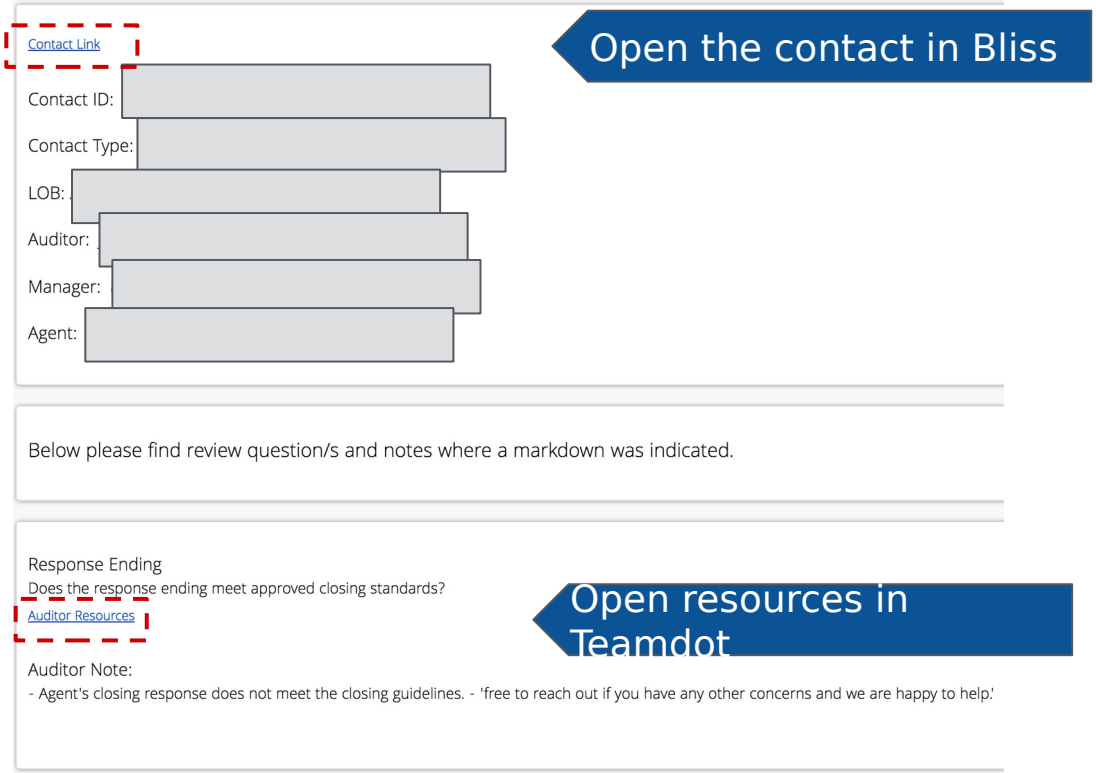
Reading CTL results

You'll need it for your coaching


Contact Link
Contact ID:
Contact Type:
LOB:
Auditor:
Manager:
Agent:
Open the contact in Bliss
Below please find review question/s and notes where a markdown was indicated.
Response Ending
Does the response ending meet approved closing standards?
Auditor Resources
Open resources in Teamdot
Auditor Note:
- Agent's closing response does not meet the closing guidelines. - 'free to reach out if you have any other concerns and we are happy to help.'

- **Review all details beforehand:** Get all relevant information both from the contact itself and from the Teamdot resources
- **Clarify with the QA if needed:** Make sure you understand why the response got the markdowns it did

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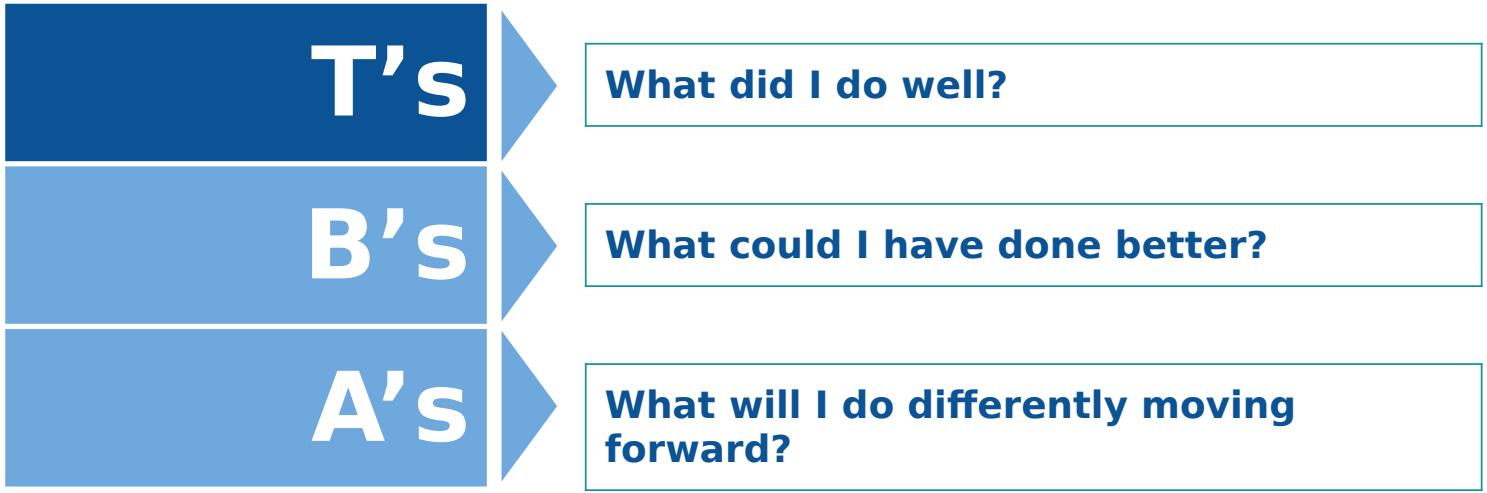
Coaching team with R² feedback

TL’s need to coach the agents using CTL form and have them ask themselves these questions



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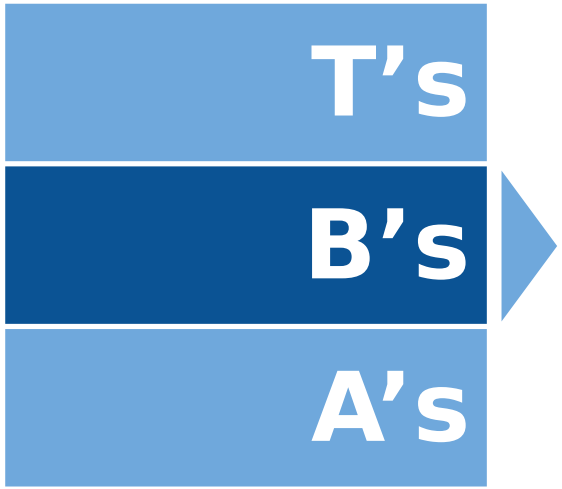
Coaching your team with R^2 feedback (2/4)

Top: What did I do well?

- **Compliment them where appropriate**: Recognize them in aspects where they did a good job
- **Reinforce correct actions**: Confirm to them what they did correctly so they will continue to do it

Coaching your team with R² feedback (3/4)



Bottom: What could I have done better?

- **Ask them first**: Have them self-assess their performance so they become more open and accepting of your feedback
- **Explain the impact**: If they don't understand why something is marked down, be clear in explaining the implications of their action

Coaching your team with R^2 feedback (4/4)

Action: What will I do differently moving forward?

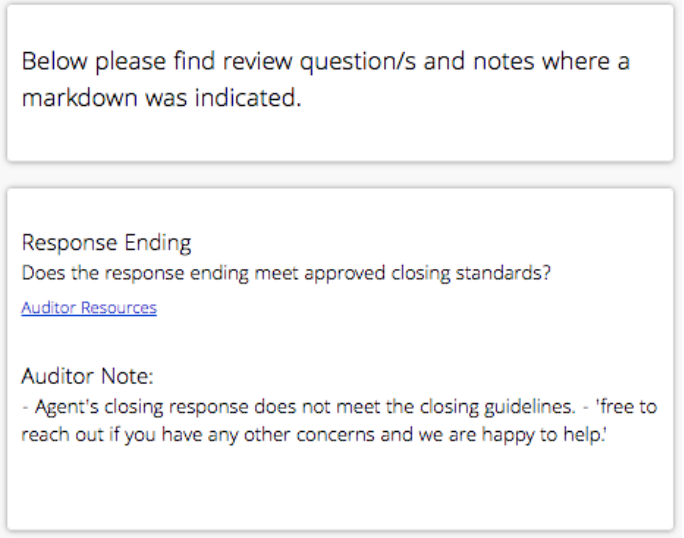
- **Don't spoonfeed**: Let them be the one to explain what actions they should take starting today
- **Get a firm commitment**: Agree on an action plan, and make sure you both sign off on it
- **Follow through:** Check on them regularly to see if they're actually doing what they

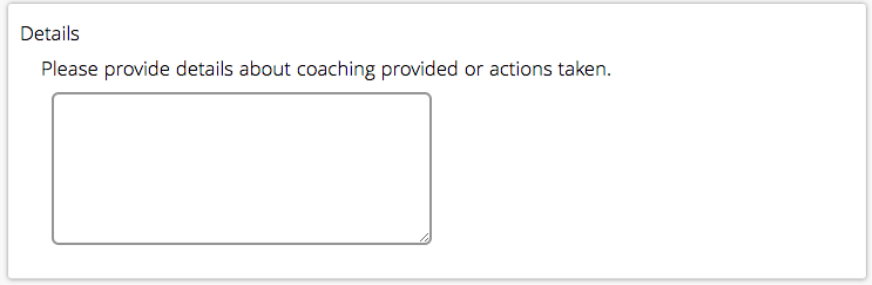
UBER

Let’s try it out

Review the report below - and coach accordingly

Agent	Team lead	Reviewer	CTL link
f*****@uber.com	c**********@uber.com	j********@uber.com	CTL Link


Below please find review question/s and notes where a markdown was indicated.
Response Ending
Does the response ending meet approved closing standards?
Auditor Resources
Auditor Note:
- Agent's closing response does not meet the closing guidelines. - 'free to reach out if you have any other concerns and we are happy to help.'



T’s → **What did I do well?**

B’s → **What could I have done better?**

A’s → **What will I do differently moving forward?**

UBER

R² Periscope basics

(This session based on needs of audience)

How to access Periscope

STEP 1

Open browser window or tab

STEP 2

Go to t.uber.com/periscopeaccess

STEP 3

Fill out form and submit!
Be sure to include First Name, Last Name, @uber.com addresses

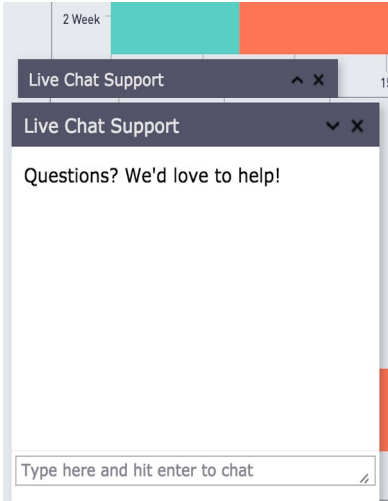
How to request support

DO

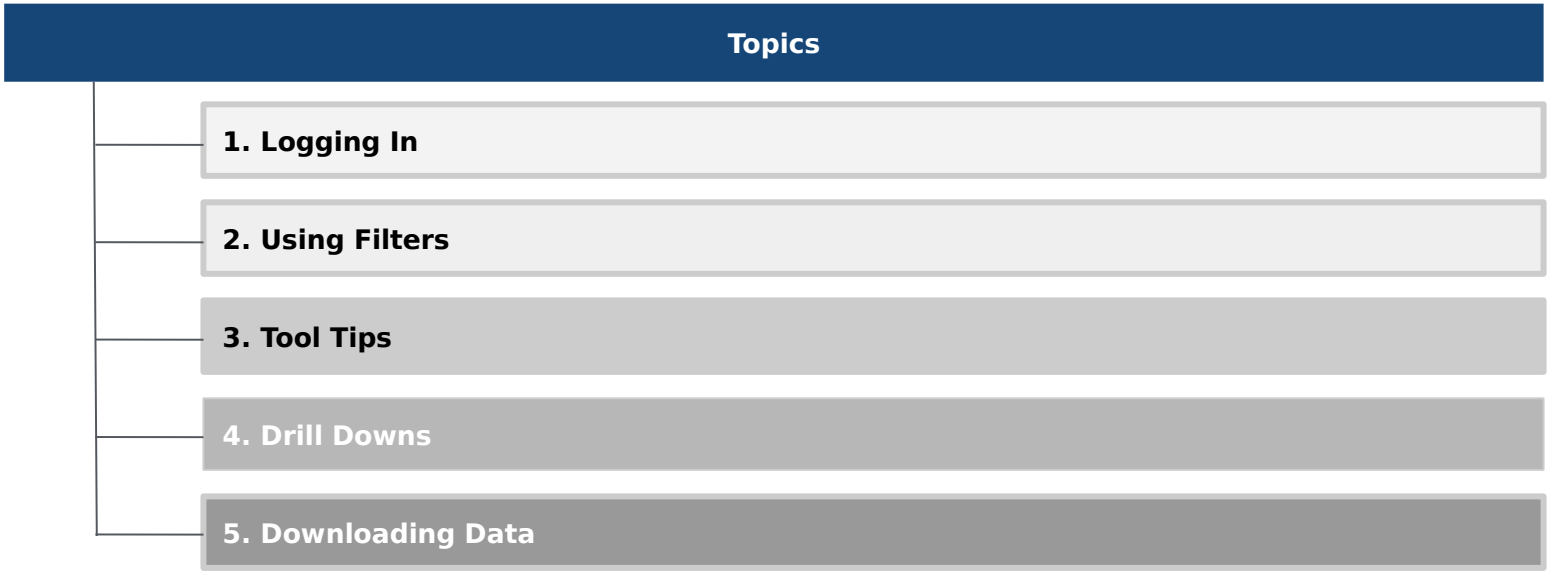
- Submit ALL requests via t.uber.com/qa_jira

DO NOT

- Use “Contact Support” or “Live Chat Support” options native in PeriscopeData



How to use Periscope

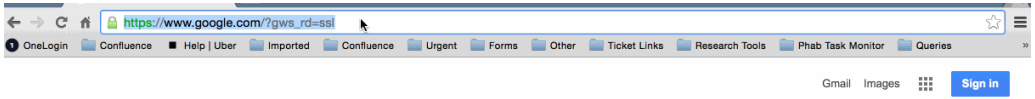


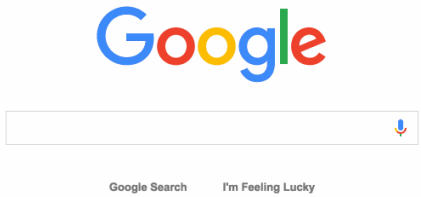
How to use Periscope

Topics

1. Logging In

1. You will receive an email from PeriscopeData to set up your account / set a password
    a. Follow the links and instructions provided in the email
2. Go to www.PeriscopeData.com
3. Enter your Credentials





How to use Periscope

Topics

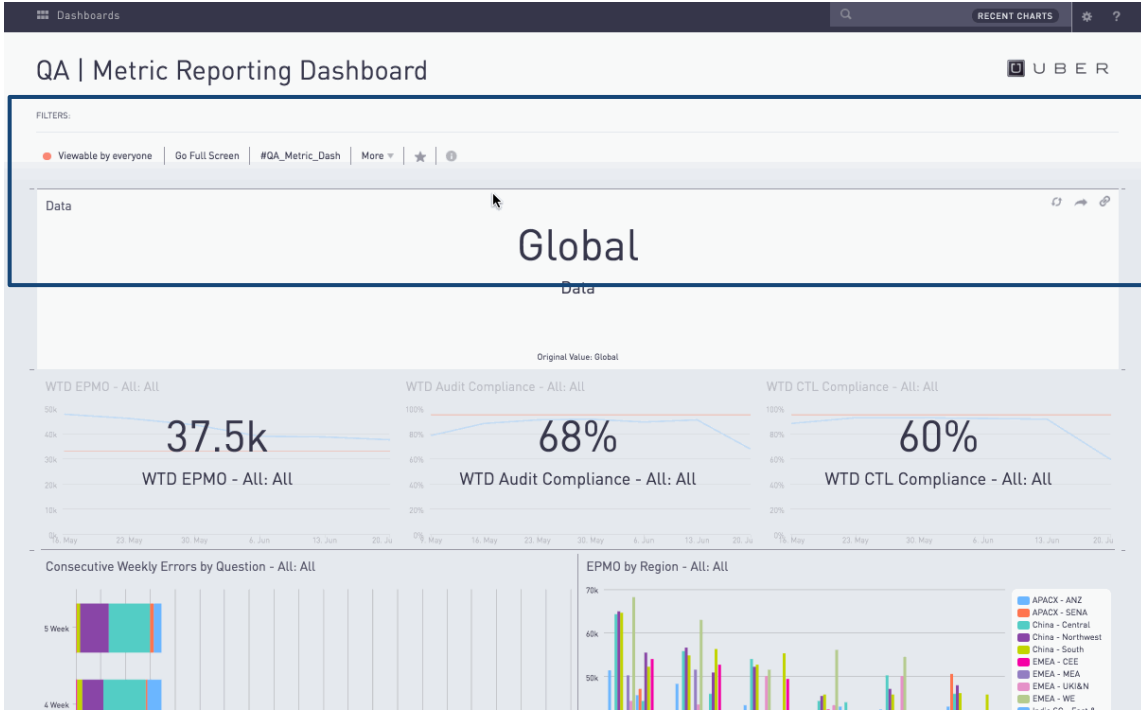
2. Using Filters

Dashboards are equipped with dynamic filters to view data at different levels. This dashboard by default will show all QA data globally; however, you may narrow your search by Region and also a specific site within each region using Filters:

1. Click the top bar labelled “Filter” (below title)
2. Select a Mega Region - this will populate the Sites that support that region in the adjacent filter column. You can choose to just look at the region or select a Site
3. Select a Region and/or Site n the adjacent filter column. You can choose to at Region only and/or Site
4. Select “Apply” (this auto-updates all charts)

To clear filters:

5. Click the top bar labelled “Filter”

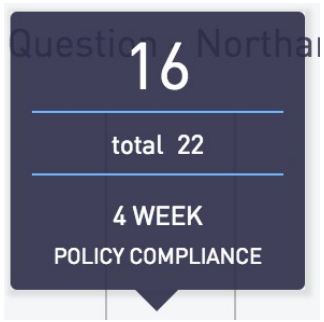


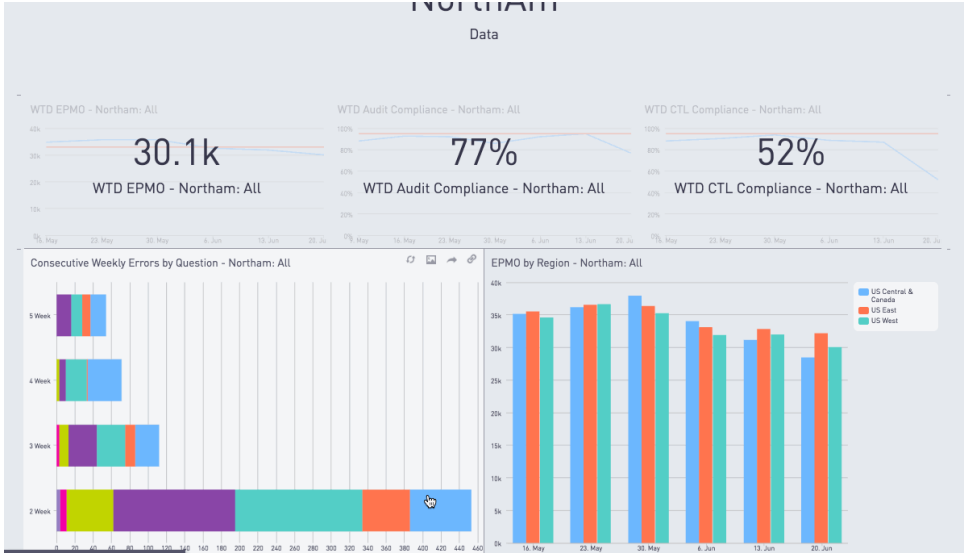
How to use Periscope

Topics

3. Tool Tips

Each chart has “Tool Tips” enabled. This means that if you hover over a part of the chart with your mouse it will provide you with details about the specific section of the chart you are looking at.




Data
WTD EPMO - Northam: All
30.1k
WTD EPMO - Northam: All
WTD Audit Compliance - Northam: All
77%
WTD Audit Compliance - Northam: All
WTD CTL Compliance - Northam: All
52%
WTD CTL Compliance - Northam: All
Consecutive Weekly Errors by Question - Northam: All
EPMO by Region - Northam: All
US Central & Canada
US East
US West

How to use Periscope

Topics

3. Tool Tips - cont.

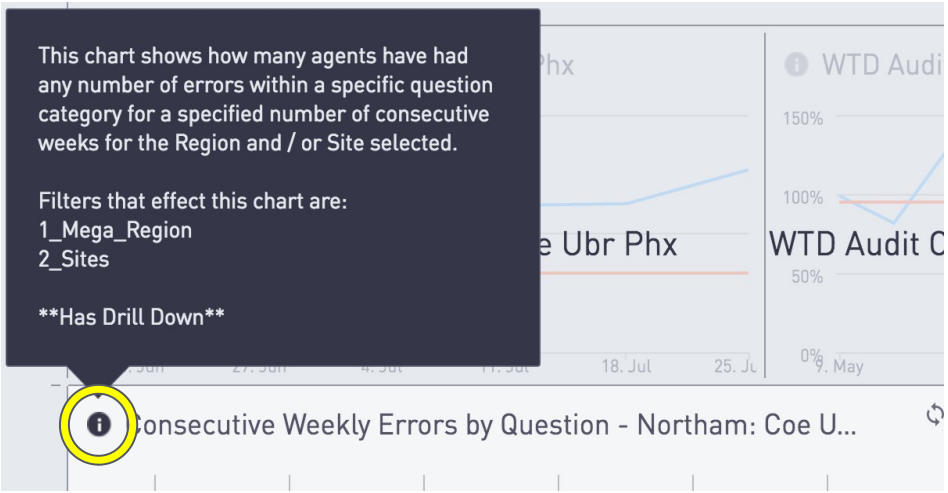
In addition to tool tips on the data points, each chart has an overall “tip” that can be found in the upper right hand corner.

This tip will explain in more detail:

1. What the chart is showing
2. Which filters apply to the chart
3. Whether or not the chart has a “drill down”*

*This is covered on the next slide

**The yellow circle is shown to indicate where to hover your mouse


This chart shows how many agents have had any number of errors within a specific question category for a specified number of consecutive weeks for the Region and / or Site selected.
Filters that effect this chart are:
1_Mega_Region
2_Sites
Has Drill Down
WTD Audi
150%
100%
50%
0%
WTD Audit C
18. Jul
25. Ju
9. May
Consecutive Weekly Errors by Question - Northam: Coe U...

How to use Periscope

Topics

4. Drill Downs

Many of the charts on the dashboard allow you to dig deeper into the information.

If you see a chart and want to know more about a specific section, **DOUBLE CLICK** on the section you are interested in and it will take you to see more information.

You can also drill down on information in a table. If you would like to see more about something that is shown in the table, **DOUBLE CLICK** on the section you are interested in and it will show you more information.

Most Drill Downs will require that you have both a Region and Site selected in order to work

How to use Periscope

Topics

5. Downloading Data

All of the Charts and Tables can be downloaded. The Charts can be downloaded as either an **IMAGE** or a **TABLE** depending on which choice you make.

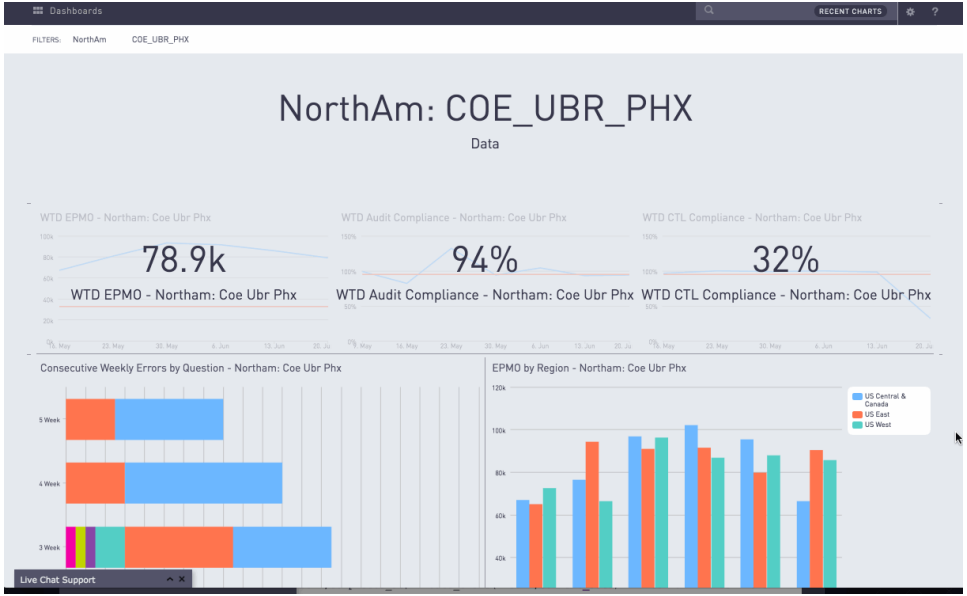
Some of the tables can be updated by selecting a date range in the “Filters” bar. You can choose preset date ranges or set a custom range.

To download the image:

1. Hover over the chart
2. Click the little “picture” box in the top right

To download the table

3. Hover over the chart or table
4. Click the single arrow in the top right


Dashboards
RECENT CHARTS
FILTERS: NorthAm COE_UBR_PHX
NorthAm: COE_UBR_PHX
Data
WTD EPMO - Northam: Coe Ubr Phx
78.9k
WTD EPMO - Northam: Coe Ubr Phx
WTD Audit Compliance - Northam: Coe Ubr Phx
94%
WTD Audit Compliance - Northam: Coe Ubr Phx
WTD CTL Compliance - Northam: Coe Ubr Phx
32%
WTD CTL Compliance - Northam: Coe Ubr Phx
Consecutive Weekly Errors by Question - Northam: Coe Ubr Phx
5 Week
4 Week
3 Week
EPMO by Region - Northam: Coe Ubr Phx
US Central & Canada
US East
US West
Live Chat Support